UCSB Equipment Management

CATS

(Capital Assets Tracking System)

Departmental Access / Processing

Instruction and Information Manual

Table of Contents

Section		Page
I.	Providing Access to Online CATS	3
II.	Logging onto ALLN01 / Online CATS	4
III.	Online CATS Field Descriptions	7
IV.	Help Screens and Transaction Codes	11
V.	Browsing Data	14
VI.	Entering or Modifying Data	17

If you have any questions about setup or processing procedures, please contact Vaughn Boyle at x7377 or email him at Vaughn.Boyle@purc.ucsb.edu.

I. PROVIDING ACCESS TO ONLINE CATS

In order for your department to view and modify its equipment records in CATS, the individual who browses and/or maintains your inventory records must have access to COMPLETE and to ALLN01.

1. Once this access has been established, your Department Security Administrator (DSA) authorizes your access to the Online CATS application, using your department's standard procedure. You can be authorized to browse and/or modify inventory information, depending upon your needs. Your DSA will assign one or both security groups to your account/UserID:

Security Group Code	Security Group Description
CATS-DB	BROWSE INVENTORY
CATS-DU	UPDATE INVENTORY DATA

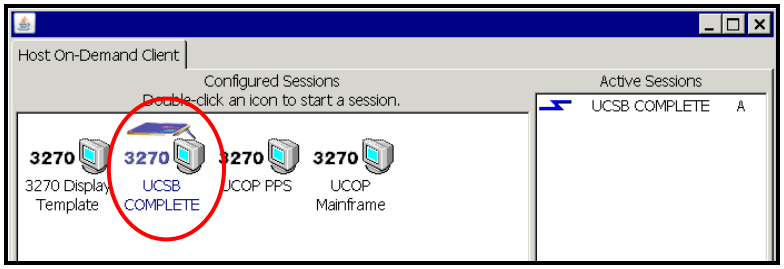
2. Access to inventorial records is restricted by Equipment Management inventorial (custody) codes. Our four digit custody codes are linked to Accounting codes: for example, Purchasing 0403 (custody code) = PURC (Accounting code). The DSA assigns access based upon the Accounting code. If an individual requires access to more than one department (or Accounting code) the DSA must assign access under each separate code.

   Please note that CATS cannot restrict access beyond the four-digit inventorial code level, therefore, departments that have many inventorial subcodes consisting of the four-digit inventorial code plus a five-digit fund number cannot restrict an individual's access to only one (or several) of these sub codes.

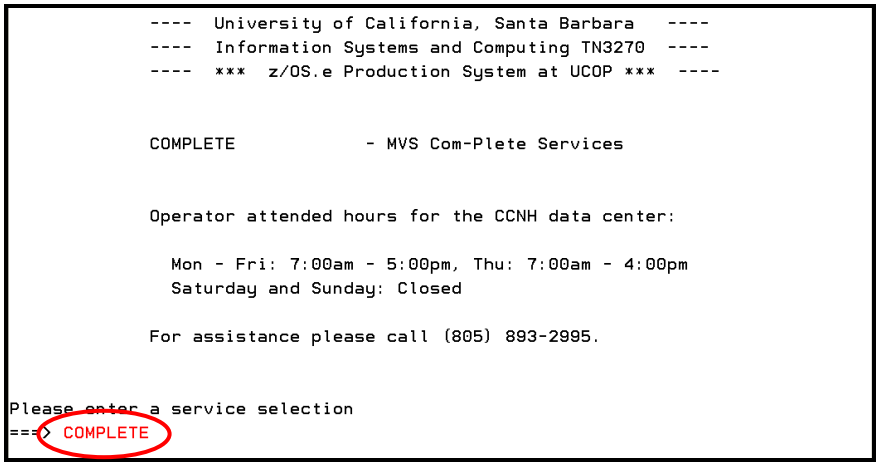
   We have attempted to map all of our inventorial codes to specific accounting codes, but errors may have occurred during the process. If you cannot access your records, please contact Vaughn Boyle at x7377. If an error has occurred, a simple change in our custody code table should correct it.

II. LOGGING ONTO ALLN01 / ONLINE CATS

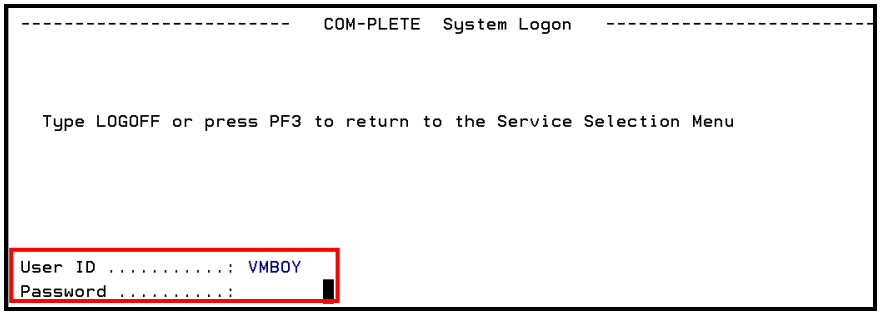
1. On the Host On-Demand, select UCSB COMPLETE by clicking the icon.



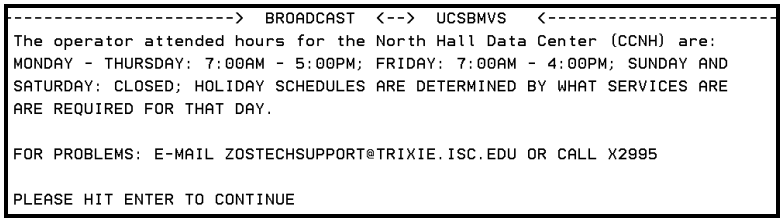
2. On the login page, type **COMPLETE** and hit ENTER.


---- University of California, Santa Barbara ----
---- Information Systems and Computing TN3270 ----
---- *** z/OS.e Production System at UCOP *** ----
COMPLETE - MVS Com-Plete Services
Operator attended hours for the CCNH data center:
Mon - Fri: 7:00am - 5:00pm, Thu: 7:00am - 4:00pm
Saturday and Sunday: Closed
For assistance please call (805) 893-2995.
Please enter a service selection
===> COMPLETE

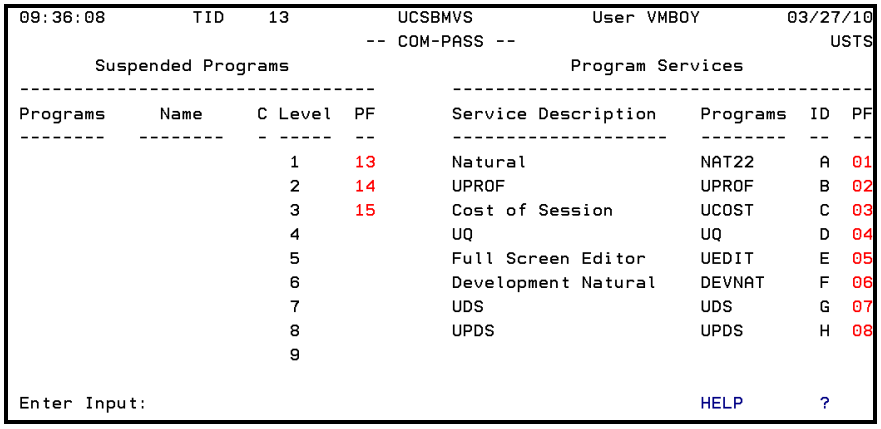
3. On the COMPLETE login page, type your **User ID** and **Password** and hit ENTER.



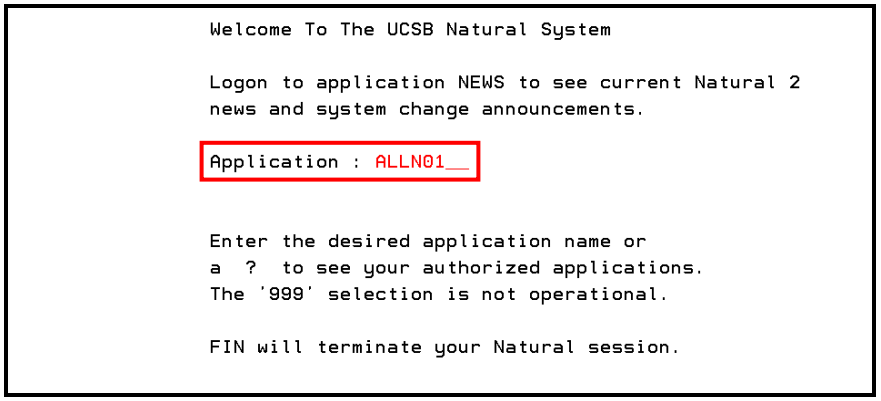
4. Hit ENTER to continue past the next screen.


----------> BROADCAST <--> UCSBMVS <----------
The operator attended hours for the North Hall Data Center (CCNH) are:
MONDAY - THURSDAY: 7:00AM - 5:00PM; FRIDAY: 7:00AM - 4:00PM; SUNDAY AND
SATURDAY: CLOSED; HOLIDAY SCHEDULES ARE DETERMINED BY WHAT SERVICES ARE
ARE REQUIRED FOR THAT DAY.
FOR PROBLEMS: E-MAIL ZOSTECHSUPPORT@TRIXIE.ISC.EDU OR CALL X2995
PLEASE HIT ENTER TO CONTINUE

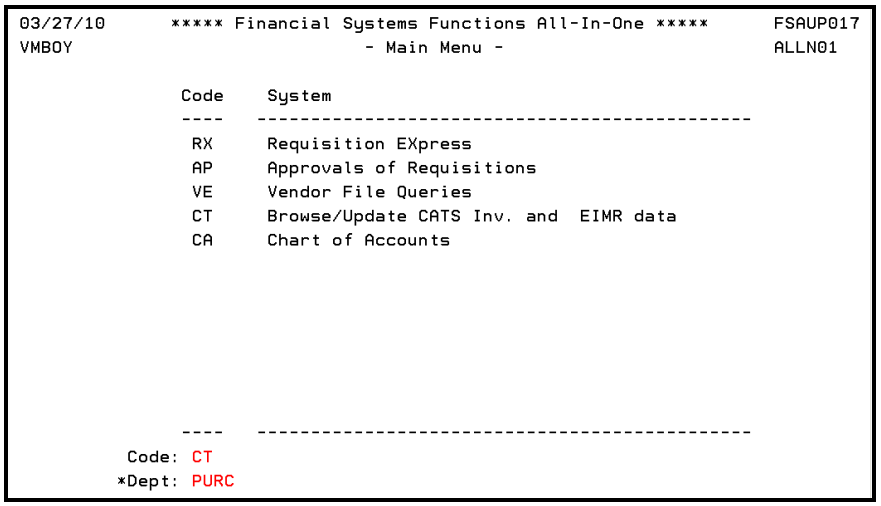
5. On the COM-PASS screen, hit the **F1** key.


09:36:08 TID 13 UCSBMVS User VMBOY 03/27/10
-- COM-PASS -- USTS
Suspended Programs
Program Services
Programs Name C Level PF
Service Description Programs ID PF
1 13 Natural NAT22 A 01
2 14 UPROF UPROF B 02
3 15 Cost of Session UCOST C 03
4 UQ UQ D 04
5 Full Screen Editor UEDIT E 05
6 Development Natural DEVNAT F 06
7 UDS UDS G 07
8 UPDS UPDS H 08
9
Enter Input:
HELP ?

6. On the Natural System page, type **ALLN01** as the application, and hit ENTER.

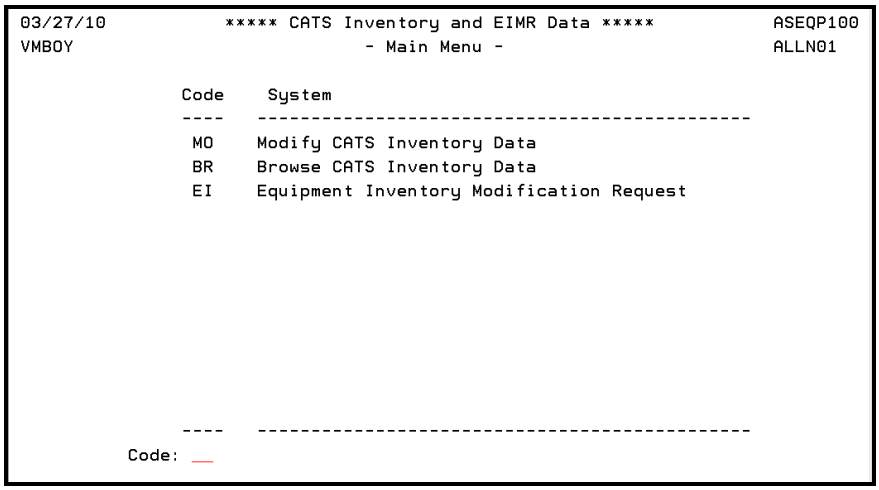

Welcome To The UCSB Natural System
Logon to application NEWS to see current Natural 2
news and system change announcements.
Application : ALLN01__
Enter the desired application name or
a ? to see your authorized applications.
The '999' selection is not operational.
FIN will terminate your Natural session.

7. On the ALLN01 Main Menu, type **CT – Browse/Update CATS Inv. and EIMR Data** as the System Code and hit ENTER.


03/27/10 ***** Financial Systems Functions All-In-One ***** FSAUP017
VMBOY - Main Menu - ALLN01
Code System
RX Requisition EXpress
AP Approvals of Requisitions
VE Vendor File Queries
CT Browse/Update CATS Inv. and EIMR data
CA Chart of Accounts
Code: CT
*Dept: PURC

NOTE: Not all of these selections may appear on your screen, as they depend upon your system authorizations.

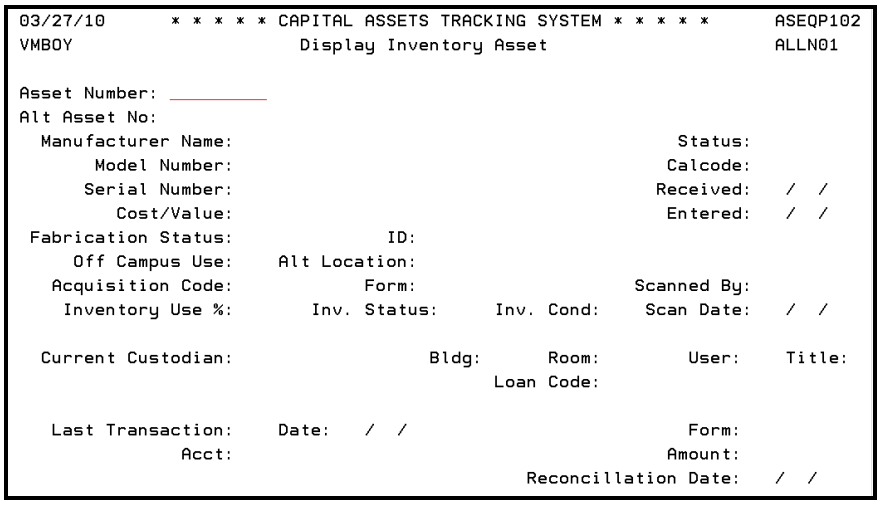
8. The CATS Inventory and EIMR Data menu appears, from which you will make further selections, as described in the next sections of the Manual.


03/27/10 ***** CATS Inventory and EIMR Data ***** ASEQP100
VMBOY - Main Menu - ALLN01
Code System
MO Modify CATS Inventory Data
BR Browse CATS Inventory Data
EI Equipment Inventory Modification Request
Code:

NOTE: Not all of these selections may appear on your screen, as they depend upon your system authorizations.

III. ONLINE CATS FIELD DESCRIPTIONS

The Modify and Browse CATS Inventory Data screens are formatted essentially the same and feature the same fields of information, described below.


03/27/10 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP102
VMBOY Display Inventory Asset ALLN01
Asset Number:
Alt Asset No:
Manufacturer Name: Status:
Model Number: Calcode:
Serial Number: Received: / /
Cost/Value: Entered: / /
Fabrication Status: ID:
Off Campus Use: Alt Location:
Acquisition Code: Form: Scanned By:
Inventory Use %: Inv. Status: Inv. Cond: Scan Date: / /
Current Custodian: Bldg: Room: User: Title:
Loan Code:
Last Transaction: Date: / / Form:
Acct: Amount:
Reconcillation Date: / /

In Alphabetical Order, by Field Name)

Acquisition Code — A two-digit numeric code which designates the type of acquisition; for example: 31 – acquisition via Purchase Order; 32 – fabrication; 34 – gift. (See the next section of the manual for a complete list.)

(Acquisition) Form — The form type (either: P – Purchase Order; E – EIMR; or G – Gift) + the six-digit number of the document by which the asset was acquired and put on campus inventory.

Alt Asset No — Former asset number, superseded by the Asset Number found in the field immediately above it. This field is usually blank and almost never used.

Alt. Location — Text field in which a location other than a UCSB Building or Room Number can be recorded.

Asset Number — The UC property number; a nine-digit number consisting of two characters indicating the calendar year of acquisition (07 for 2007) + one character indicating the campus (8 = UCSB) + six digits assigned in sequential order during a calendar year (000001 through 000645, for example).

Building — The UCSB building number (as validated against the official campus database). (See the next section of the manual for the HELP screen.)

Calcode — A five-digit alphanumeric code (one alpha + four numeric) which designates the category into which a piece of equipment falls (computers = H0780; E6300 = electron microscopes, etc.); the Calcode Table is maintained by Office of the President.

Cost/Value — The total cost/value of an asset, as recorded in CATS; this value includes not only the value on the original purchase order, but also a value added via subsequent purchase orders; the value is rounded to the nearest dollar.

Current Custodian — The Custody Code to which the asset is currently assigned; consisting of location code 8 (Santa Barbara) + four-digit primary department custody code + 00 ("state" and other similar funds), or 19 (self-supporting unit funds), or five-digit fund number (extramural funds).

Desc(ription) — A description of the asset, following a standardized format generally beginning with a key noun, such as "Microcomputer,22"monitor" or "Printer-Laserjet,Color."

NOTE: The field name does not appear on the "Browse" screen, although the information appears directly to the right of the Asset Number.

Entered — The date the asset record was initially created in CATS.

Fabrication Status — If the asset is a Fabrication, either I (incomplete) or C (complete).

(Fabrication) ID — The (usually shortened) name of the fabrication, used to track it and its inventorial components.

Inv. Cond — A number from 1-4 indicating the current condition of the asset:

1: Excellent
2: Good
3: Fair
4: Poor

(See the next section of the manual for the HELP screen.)

Inv. Status — A letter (N, E, O, R) indicating the asset status at the time of acquisition (unless it currently needs repair):

N: Bought new
E: Bought used, reconditioned
O: Bought new, without reconditioning
R: Repairs needed

(See the next section of the manual for the HELP screen.)

Inventory Use %	A number from 0-100, indicating the use of the asset by the custodial department; generally, 100% (the default setting), unless an asset is shared by departments, or rarely used. (See the next section of the manual for the HELP screen.)
Last Transaction	The transaction code associated with the last transaction processed for the asset. If no transactions have occurred since purchase, it will be the same as the acquisition transaction. It may be a price adjustment (type 52), add-on (type 50), transfer between departments (90), etc.. (See the next section of the manual for a complete list.)
(Last Trans) Acct	If the last transaction was financial (price adjustment, add-on), the account number associated with that transaction.
(Last Trans) Amount	If the last transaction was financial, the amount of the transaction.
(Last Trans) Date	The date of the last transaction.
(Last Trans) Form	The form type and number of the last transaction (see Acquisition Form, above).
Loan Code	A system-derived alpha code derived from the transaction code associated with a loaned asset.
Manufacturer Name	The manufacturer (not necessarily the vendor) of the asset.
Model Number	The model number (sometimes model name) of the asset; may read “none” or “NA” (for example, if the asset is a fabrication.
Off Campus Use	Either blank (on-campus use) or Y (off-campus use).
Received	The estimated date of receival of the asset, per the Purchase Order; cannot be modified after initial entry because any changes affect reporting to Office of the President.
Reconciliation Date	The date on which the value of the Purchase Order under which the asset(s) was purchased, as entered into CATS, reconciles with the total payments made against the Purchase Order, per General Ledger records.
Room	The UCSB room number (as validated against the official campus database); may be blank. (See the next section of the manual for the HELP screen.)
Serial Number	If applicable, the alphanumeric serial number specific to the asset.

Status	Either A (Active) or D (Disposed).
Title	Either blank (University title) or Y (title held by federal government or some other non-University agency or individual). If Y, more specific title information appears in the space below the field: Federal State Sponsor Other
User	A two-character alphanumeric, assigned by the department, identifying the specific user of the asset; may be blank.

IV. HELP SCREENS AND TRANSACTION CODES

On the **Modify Inventory Data** screen (but NOT on the **Browse CATS Data** screen), Help Screens are available for fields whose name is preceded by an asterisk (*). They may be viewed by one of two methods:

1. Position the cursor in the field and hit **PF1** (Help); or
2. Type "**?**" in the first space of the field and hit ENTER.

Five fields have Help Screens:

a. Inventory Use Percentage. The screen presents a brief statement describing the field and when to enter a number other than the default 100%.

```
                                                                    ASEQM201

  Inventory use percentage is normally 100%, except when a piece of
equipment is shared with another department(s).  In such cases, the
owner department should enter an inventory use percentage corresponding
to its share of use of the piece of equipment (50%, 75%, etc.).
```

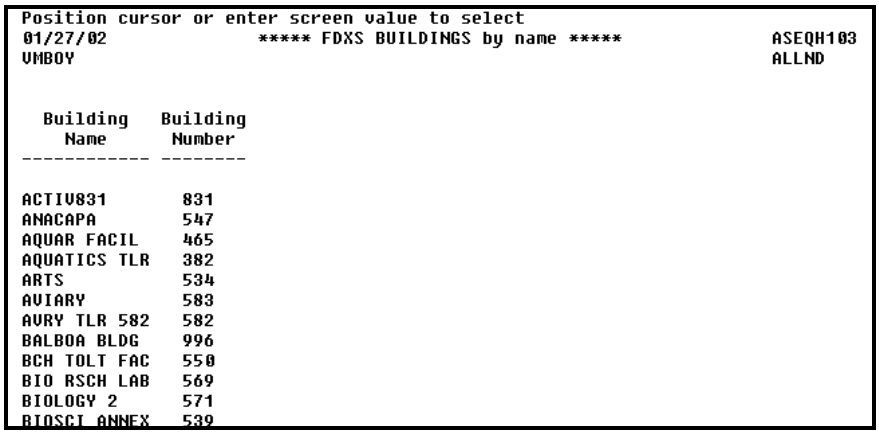
b. Inventory Status. The screen presents the four possible options.

```
Position cursor or enter screen value to select
01/27/02          ***** Inventory Status Browse Select *****          ASEQH101
VMBOY                                                                 ALLND


Inventory Item Status   Inventory Item Status Desc
---------------------- ------------------------------

          E            BOUGHT USED, RECONDITIONED
          N            BOUGHT NEW
          O            BOUGHT USED, NOT RECONDITIONED
          R            REPAIRS NEEDED
                           *** End of Data ***
```

c. Inventory Condition. The screen presents the four possible options.

```
Position cursor or enter screen value to select
01/27/02      ***** Inventory Condition Code Browse Select *****      ASEQH102
VMBOY                                                                 ALLND


Inventory Condition    Inventory Condition Desc
------------------- ------------------------------

         1           EXCELLENT
         2           GOOD
         3           FAIR
         4           POOR
                           *** End of Data ***
```

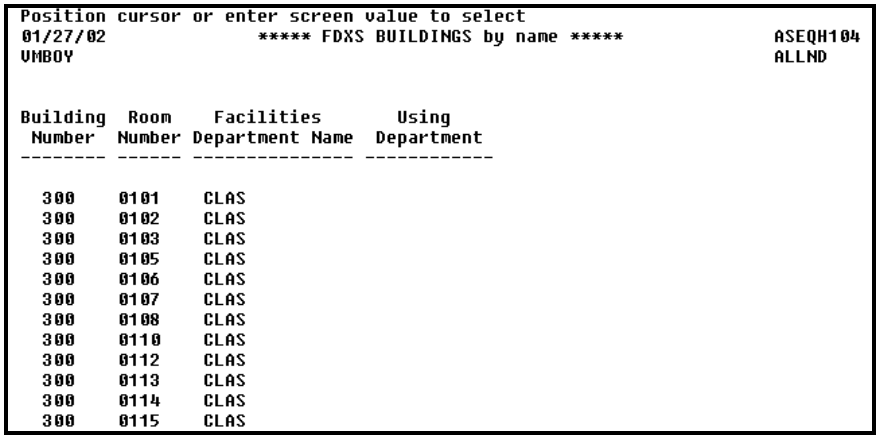
d. Building Number. A screen linked to the official campus database.



```
Position cursor or enter screen value to select
01/27/02              ***** FDXS BUILDINGS by name *****              ASEQH103
VMBOY                                                                 ALLND


  Building   Building
    Name      Number
------------ --------

ACTIV831       831
ANACAPA        547
AQUAR FACIL    465
AQUATICS TLR   382
ARTS           534
AVIARY         583
AVRY TLR 582   582
BALBOA BLDG    996
BCH TOLT FAC   550
BIO RSCH LAB   569
BIOLOGY 2      571
BIOSCI ANNEX   539
```

If you enter a building name used in the system, the screen will display the building name / number combination (for example, SAASB = 568; Cheadle Hall = 552).

e. Room Number. A screen linked to the official campus database.



```
Position cursor or enter screen value to select
01/27/02              ***** FDXS BUILDINGS by name *****              ASEQH104
VMBOY                                                                 ALLND


Building  Room    Facilities       Using
 Number  Number Department Name  Department
-------- ------ --------------- ------------

  300    0101    CLAS
  300    0102    CLAS
  300    0103    CLAS
  300    0105    CLAS
  300    0106    CLAS
  300    0107    CLAS
  300    0108    CLAS
  300    0110    CLAS
  300    0112    CLAS
  300    0113    CLAS
  300    0114    CLAS
  300    0115    CLAS
```

When a building number alone is entered, it displays all currently valid room numbers for that building. If a building / room number combination is entered, it will display that combination, IF the room number exists; if the room number does not exist, the screen will jump to the first room of next building number.

NOTE: Although they do not appear on this help screen, five "Non-Building Numbers" have been created in order to permit departments to provide more accurate information for assets not located in a building, or in a building that does not have a UCSB building number:

- 1100 on campus, but in a non-building location (motor vehicles, on roof tops or lawns, etc.)
- 1101 outside of UCSB, within the state of California
- 1102 outside of California, within the USA
- 1103 outside of the USA, within the World
- 1104 at sea

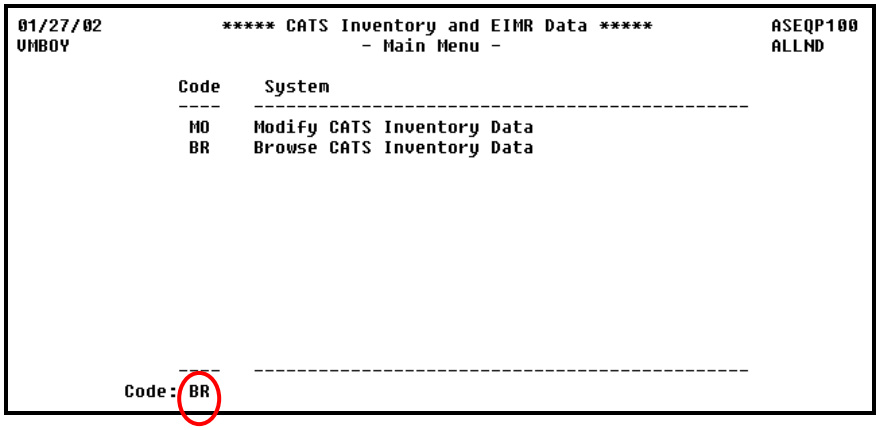
Transaction Codes

Because the Transaction Code HELP screen is only accessible from the Transaction History subscreen, which is reached viewed by pressing the **F6** key on the Browse screen, a complete list is provided here for quick reference.

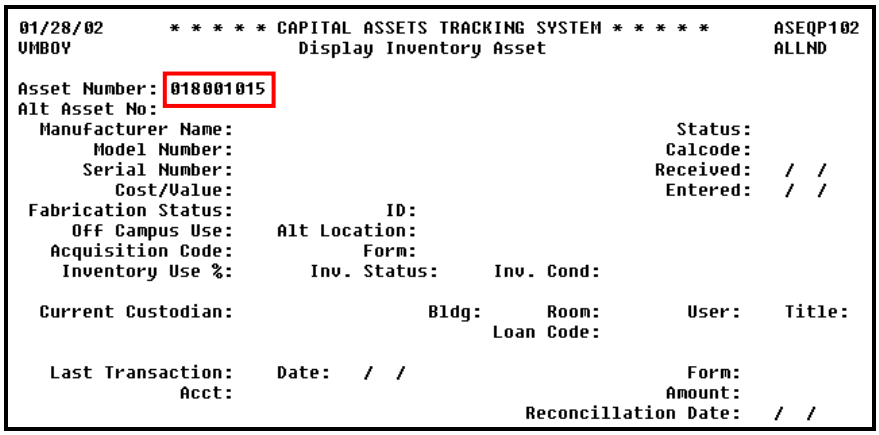
Code	Description
01	Bulk Transfer
10	Terminate Off-Campus Use Loan (95)
11	Terminate Interdepartmental Loan (96)
12	Terminate Intercampus Loan (97)
16	Terminate Borrowed Intercampus Equipment (37)
17	Terminate Borrowed Non-UC, non-Federal Equipment (38)
20	Terminate Borrowed Federal-title Equipment (39)
21	Sold
22	Lost
23	Destroyed
24	Trade-in
25	Theft
26	Intercampus Transfer
27	Return of Federal-Title Equipment
28	Disposal of Federal-Title Equipment
29	Miscellaneous
30	Purchase Order - Federal Title
31	Purchase Order – UC and all non-Federal Title
32	Fabrication
33	Purchase by Regent's Contract
34	Gift
35	Found
36	Intercampus Transfer
37	Borrowed from Other UC Campus
38	Borrowed from Non-UC, Non-Federal Entity
39	Borrowed from Federal Government
41	Miscellaneous-Inventory Adjustment
42	Gift of Federal-Title Equipment
43	Lease Option
44	Non-Inventorial Equipment
45	Recovered
48	Fabrication Value Adjustment
49	Cancel Item - Not Received or Non Inventorial
50	Add-On Value Adjustment
52	Non-Add-On Value Adjustment
86	Disposed – Fully Depreciated Under Current Threshold
90	Interdepartmental Transfer
95	Off-Campus Loan
96	Interdepartmental Loan
97	Intercampus Loan

V. BROWSING RECORDS

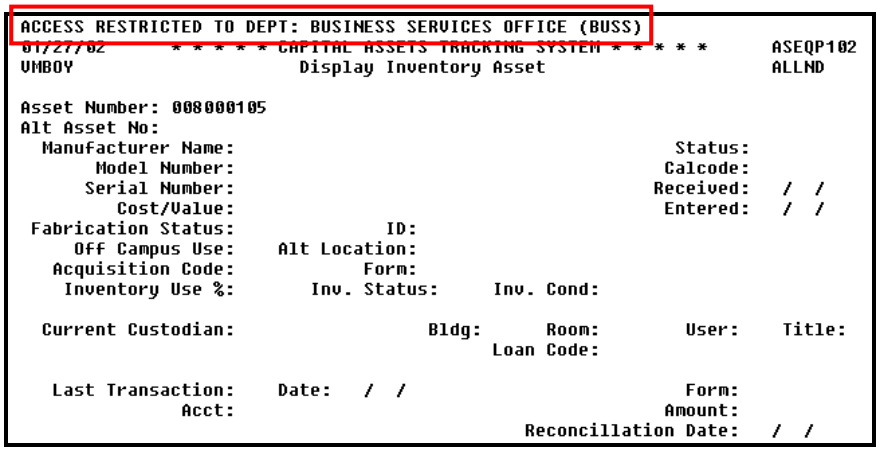
1. On the **CATS Inventory Data Main Menu**, type (Code) **BR –Browse CATS Inventory Data** and hit ENTER.


01/27/02 ***** CATS Inventory and EIMR Data ***** ASEQP100
VMBOY - Main Menu - ALLND
Code System
MO Modify CATS Inventory Data
BR Browse CATS Inventory Data
Code: BR

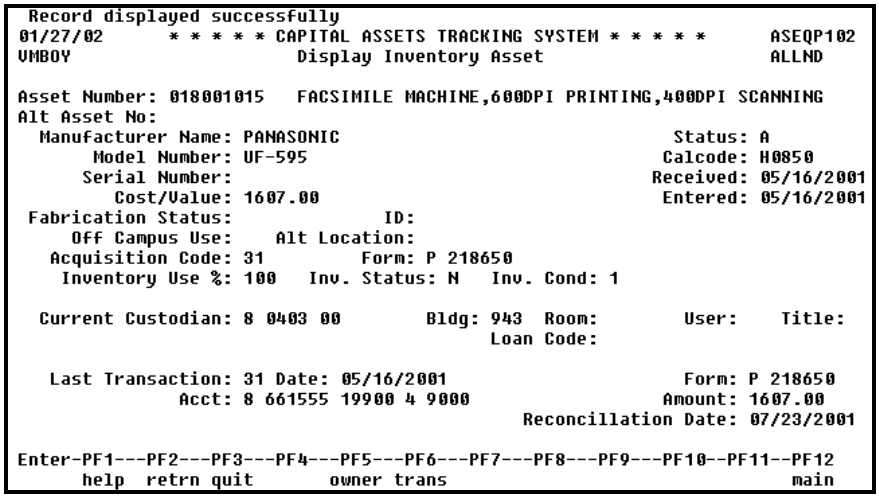
2. On the **Display Asset** screen, type an Asset (Property) Number and hit ENTER.


01/28/02 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP102
VMBOY Display Inventory Asset ALLND
Asset Number: 018001015
Alt Asset No:
Manufacturer Name: Status:
Model Number: Calcode:
Serial Number: Received: / /
Cost/Value: Entered: / /
Fabrication Status: ID:
Off Campus Use: Alt Location:
Acquisition Code: Form:
Inventory Use %: Inv. Status: Inv. Cond:
Current Custodian: Bldg: Room: User: Title:
Loan Code:
Last Transaction: Date: / / Form:
Acct: Amount:
Reconcillation Date: / /

NOTE: If you enter the property number of another department's asset, an error message is displayed: "ACCESS RESTRICTED TO: DEPARTMENT NAME."


ACCESS RESTRICTED TO DEPT: BUSINESS SERVICES OFFICE (BUSS)
01/27/02 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP102
VMBOY Display Inventory Asset ALLND
Asset Number: 008000105
Alt Asset No:
Manufacturer Name: Status:
Model Number: Calcode:
Serial Number: Received: / /
Cost/Value: Entered: / /
Fabrication Status: ID:
Off Campus Use: Alt Location:
Acquisition Code: Form:
Inventory Use %: Inv. Status: Inv. Cond:
Current Custodian: Bldg: Room: User: Title:
Loan Code:
Last Transaction: Date: / / Form:
Acct: Amount:
Reconcillation Date: / /

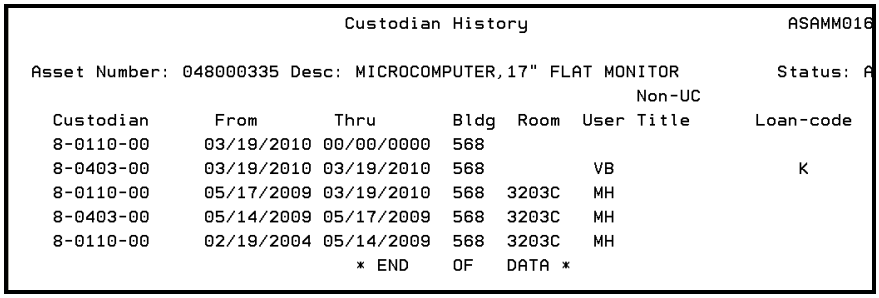
3. If you have entered the property number of an asset in your department's custody, the asset information is displayed.



```
 Record displayed successfully
01/27/02      * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * *      ASEQP102
VMBOY                     Display Inventory Asset                      ALLND

Asset Number: 018001015   FACSIMILE MACHINE,600DPI PRINTING,400DPI SCANNING
Alt Asset No:
  Manufacturer Name: PANASONIC                                Status: A
       Model Number: UF-595                                 Calcode: H0850
      Serial Number:                                       Received: 05/16/2001
         Cost/Value: 1607.00                                Entered: 05/16/2001
 Fabrication Status:              ID:
     Off Campus Use:    Alt Location:
   Acquisition Code: 31         Form: P 218650
    Inventory Use %: 100   Inv. Status: N   Inv. Cond: 1

  Current Custodian: 8 0403 00        Bldg: 943  Room:        User:    Title:
                                           Loan Code:

   Last Transaction: 31 Date: 05/16/2001                      Form: P 218650
               Acct: 8 661555 19900 4 9000                  Amount: 1607.00
                                          Reconcillation Date: 07/23/2001

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
      help  retrn quit       owner trans                              main
```

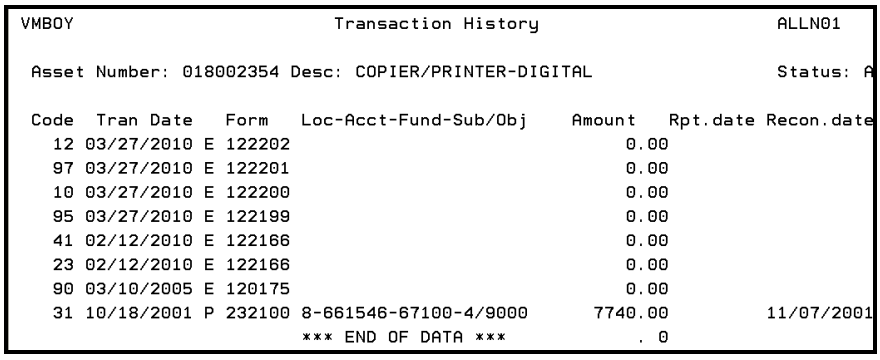
For the most part, the information is the same as that which appears on the Physical Inventory, but with additional detail that may be viewed by using PF keys. (When on one of this subscreens, press **F2** or **F4** to return to the Browse screen.)

i. **PF5 / Owner** – This screen displays the asset's custody history. If it has been transferred between departments, separate custodies, with begin and end dates, will be shown for each custody, the most recent displayed at top, with a 00/00/0000 end date.



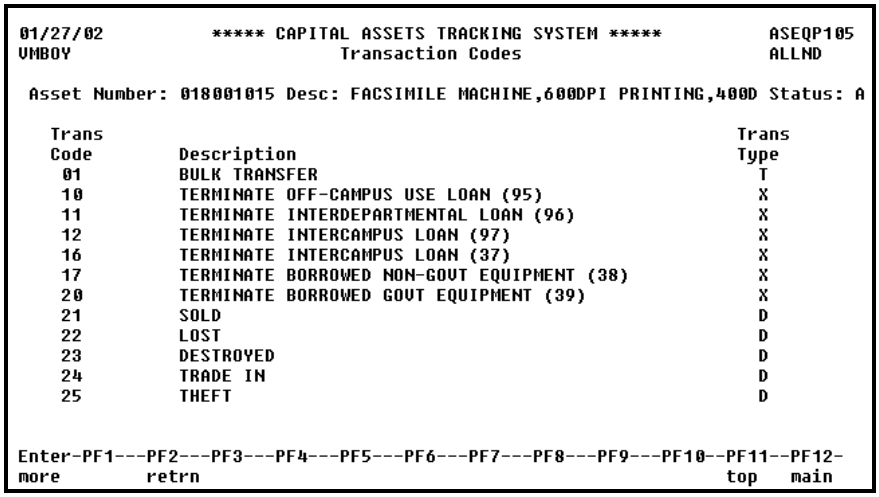
```
                          Custodian History                          ASAMM016

 Asset Number: 048000335 Desc: MICROCOMPUTER,17" FLAT MONITOR         Status: A
                                                          Non-UC
   Custodian      From       Thru       Bldg  Room  User Title      Loan-code
   8-0110-00     03/19/2010 00/00/0000  568
   8-0403-00     03/19/2010 03/19/2010  568          VB                 K
   8-0110-00     05/17/2009 03/19/2010  568  3203C   MH
   8-0403-00     05/14/2009 05/17/2009  568  3203C   MH
   8-0110-00     02/19/2004 05/14/2009  568  3203C   MH
                             * END    OF   DATA *
```

ii. **PF6 / Transactions** – This screen displays all transactions (acquisitions, disposals, reacquisitions, price adjustments, transfers, off-campus loans, etc.) processed by Equipment Management related to the asset.



```
VMBOY                       Transaction History                        ALLN01

 Asset Number: 018002354 Desc: COPIER/PRINTER-DIGITAL                  Status: A

 Code  Tran Date   Form   Loc-Acct-Fund-Sub/Obj    Amount   Rpt.date Recon.date
   12 03/27/2010 E 122202                             0.00
   97 03/27/2010 E 122201                             0.00
   10 03/27/2010 E 122200                             0.00
   95 03/27/2010 E 122199                             0.00
   41 02/12/2010 E 122166                             0.00
   23 02/12/2010 E 122166                             0.00
   90 03/10/2005 E 120175                             0.00
   31 10/18/2001 P 232100 8-661546-67100-4/9000    7740.00         11/07/2001
                          *** END OF DATA ***          . 0
```

*NOTE: When on the Transaction History screen, a table identifying the two-digit transaction codes may be accessed by hitting **PF7**.*

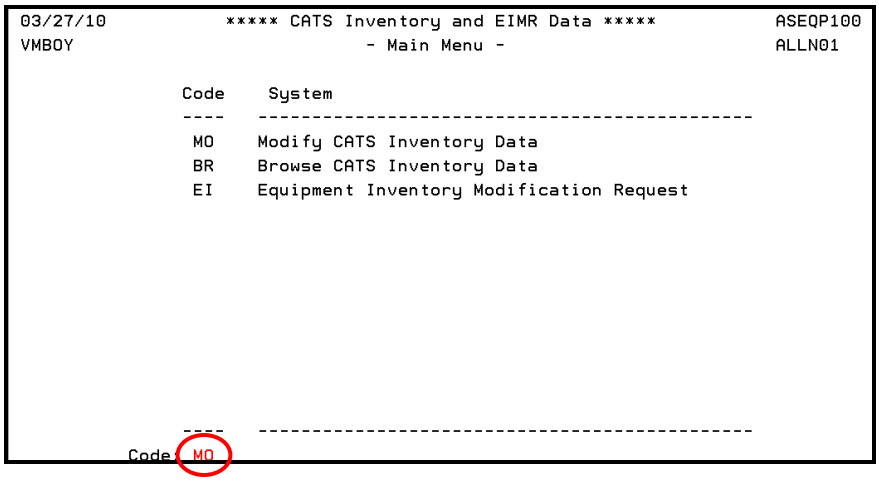


```
01/27/02          ***** CAPITAL ASSETS TRACKING SYSTEM *****          ASEQP105
VMBOY                          Transaction Codes                     ALLND

 Asset Number: 018001015 Desc: FACSIMILE MACHINE,600DPI PRINTING,400D Status: A

   Trans                                                              Trans
   Code        Description                                            Type
    01         BULK TRANSFER                                           T
    10         TERMINATE OFF-CAMPUS USE LOAN (95)                      X
    11         TERMINATE INTERDEPARTMENTAL LOAN (96)                   X
    12         TERMINATE INTERCAMPUS LOAN (97)                         X
    16         TERMINATE INTERCAMPUS LOAN (37)                         X
    17         TERMINATE BORROWED NON-GOVT EQUIPMENT (38)              X
    20         TERMINATE BORROWED GOVT EQUIPMENT (39)                  X
    21         SOLD                                                    D
    22         LOST                                                    D
    23         DESTROYED                                               D
    24         TRADE IN                                                D
    25         THEFT                                                   D


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
more        retrn                                                  top   main
```

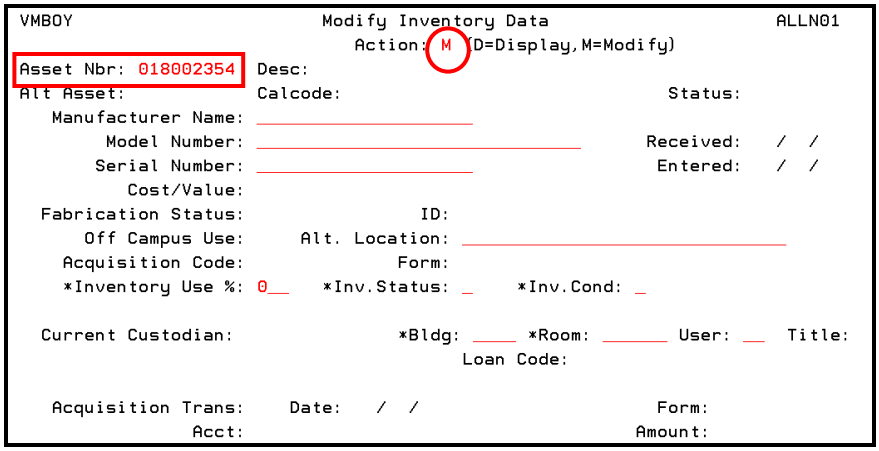
If the transaction code that you are seeking does not appear on the first screen, continue hitting ENTER until you reach it (there are 4 screen views).

V. ENTERING OR MODIFYING DATA

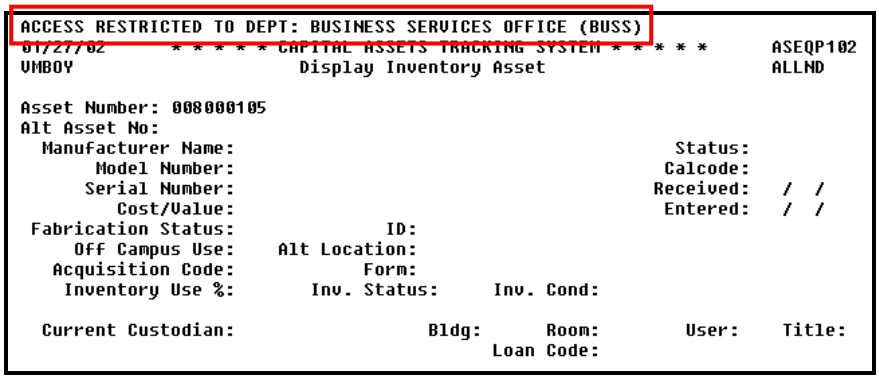
1. On the **CATS Inventory Data Main Menu**, type (Code) **MO- Modify CATS Inventory Data** and hit ENTER.


03/27/10 ***** CATS Inventory and EIMR Data ***** ASEQP100
VMBOY - Main Menu - ALLN01
Code System
MO Modify CATS Inventory Data
BR Browse CATS Inventory Data
EI Equipment Inventory Modification Request
Code: MO

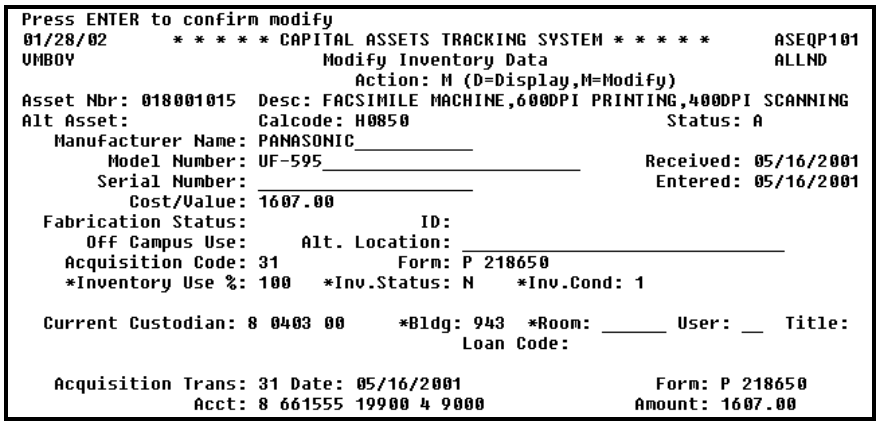
2. On the **Modify Inventory Data** screen, enter **M** as the Action, an **Asset (Property) Number** and hit ENTER.



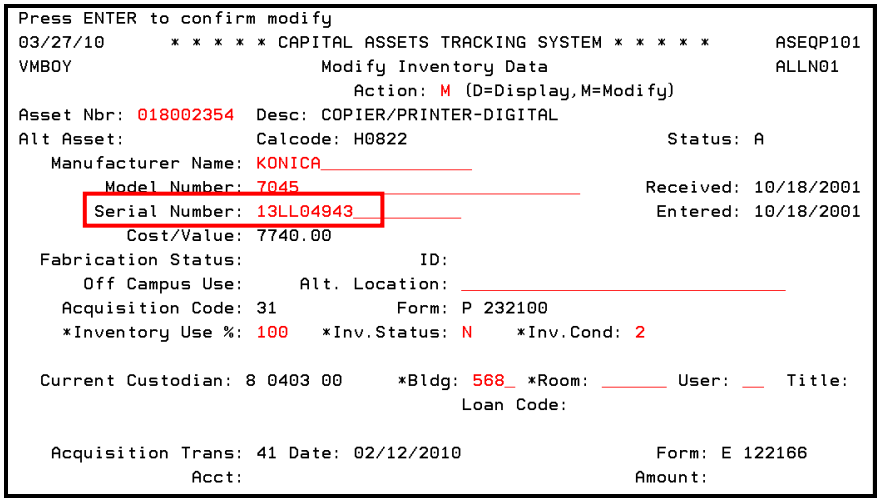
NOTE: If you enter the property number of another department's asset, an error message is displayed: "ACCESS RESTRICTED TO: DEPARTMENT NAME."


ACCESS RESTRICTED TO DEPT: BUSINESS SERVICES OFFICE (BUSS)
01/27/02 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP102
VMBOY Display Inventory Asset ALLND
Asset Number: 008000105
Alt Asset No:
Manufacturer Name: Status:
Model Number: Calcode:
Serial Number: Received: / /
Cost/Value: Entered: / /
Fabrication Status: ID:
Off Campus Use: Alt Location:
Acquisition Code: Form:
Inventory Use %: Inv. Status: Inv. Cond:
Current Custodian: Bldg: Room: User: Title:
Loan Code:

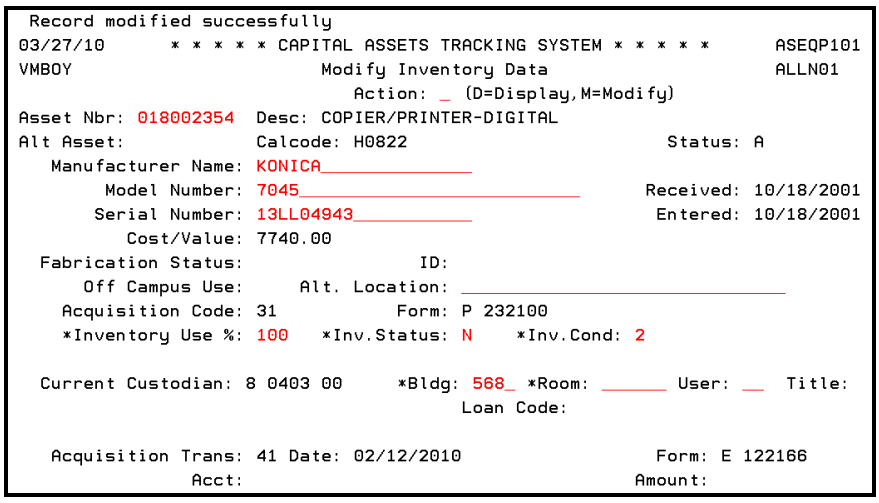
3. If you have entered the property number of an asset in your department's custody, the asset information is displayed.


Press ENTER to confirm modify
01/28/02 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP101
VMBOY Modify Inventory Data ALLND
Action: M (D=Display,M=Modify)
Asset Nbr: 018001015 Desc: FACSIMILE MACHINE,600DPI PRINTING,400DPI SCANNING
Alt Asset: Calcode: H0850 Status: A
Manufacturer Name: PANASONIC
Model Number: UF-595 Received: 05/16/2001
Serial Number: Entered: 05/16/2001
Cost/Value: 1607.00
Fabrication Status: ID:
Off Campus Use: Alt. Location:
Acquisition Code: 31 Form: P 218650
*Inventory Use %: 100 *Inv.Status: N *Inv.Cond: 1
Current Custodian: 8 0403 00 *Bldg: 943 *Room: User: Title:
Loan Code:
Acquisition Trans: 31 Date: 05/16/2001 Form: P 218650
Acct: 8 661555 19900 4 9000 Amount: 1607.00

4. Enter new data (a serial number, in this example), or update previously existing data in one of the modifiable fields (see the Appendix for the list), and hit ENTER.


Press ENTER to confirm modify
03/27/10 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP101
VMBOY Modify Inventory Data ALLN01
Action: M (D=Display,M=Modify)
Asset Nbr: 018002354 Desc: COPIER/PRINTER-DIGITAL
Alt Asset: Calcode: H0822 Status: A
Manufacturer Name: KONICA
Model Number: 7045 Received: 10/18/2001
Serial Number: 13LL04943 Entered: 10/18/2001
Cost/Value: 7740.00
Fabrication Status: ID:
Off Campus Use: Alt. Location:
Acquisition Code: 31 Form: P 232100
*Inventory Use %: 100 *Inv.Status: N *Inv.Cond: 2
Current Custodian: 8 0403 00 *Bldg: 568 *Room: User: Title:
Loan Code:
Acquisition Trans: 41 Date: 02/12/2010 Form: E 122166
Acct: Amount:

4. The record is updated; the "Record Modified Successfully" message appears.


Record modified successfully
03/27/10 * * * * * CAPITAL ASSETS TRACKING SYSTEM * * * * * ASEQP101
VMBOY Modify Inventory Data ALLN01
Action: (D=Display,M=Modify)
Asset Nbr: 018002354 Desc: COPIER/PRINTER-DIGITAL
Alt Asset: Calcode: H0822 Status: A
Manufacturer Name: KONICA
Model Number: 7045 Received: 10/18/2001
Serial Number: 13LL04943 Entered: 10/18/2001
Cost/Value: 7740.00
Fabrication Status: ID:
Off Campus Use: Alt. Location:
Acquisition Code: 31 Form: P 232100
*Inventory Use %: 100 *Inv.Status: N *Inv.Cond: 2
Current Custodian: 8 0403 00 *Bldg: 568 *Room: User: Title:
Loan Code:
Acquisition Trans: 41 Date: 02/12/2010 Form: E 122166
Acct: Amount:

5. If you realize that you made an error, do not panic: enter action code **M**, retype the correct information and press ENTER a second time. The incorrect information is overwritten.

APPENDIX – MODIFIABLE FIELDS

Departments can enter or modify information in the following fields, with certain restrictions.

1. Manufacturer Name: The name of the manufacturer of the asset (UCSB is entered, if it is a fabrication). This is a mandatory field and may not be left blank.

   Helpful Hint: *It is sometimes difficult for Equipment Management to determine the manufacturer at the time that a Purchase Requisition is submitted: sometimes only the vendor's name (not necessarily the manufacturer) appears. Therefore, department corrections may be required.*

2. Model Number: The model number of the asset. This is a mandatory field and may not be left blank.

   Helpful Hint: *Purchase Requisitions and Purchase Orders do not always provide a clear model number. Since the field cannot be blank, Equipment Management may need to enter a catalog number or its best guess in order to create the record and assign an asset number. Therefore, department corrections may be required.*

3. Serial Number: The serial number of the asset. This is not a mandatory field because not all assets have serial numbers. However, this is the most critical item of information in reporting and tracing lost or stolen assets. When a serial number exists, it is a mandatory element of the equipment record per Federal regulations.

4. Alt(ernate) Location: This is not a mandatory field and should be left blank in most cases. It may, however, be used to enter location information other than a UCSB building or room number. For example, you can specify that an asset is located "on the roof, bldg. 515" or "in the yard" or "in basement storage." This field may also be used to indicate, in cases of off-campus use, that an asset is to be found at a "professor's home" or a research station in "Costa Rica."

   Helpful Hint: *Entry of information in the "Alt. Location" field does not relieve you of the responsibility for entering building and room numbers for all assets (see below). Off-campus use of an asset, even if you enter the location in this field, must still be officially recorded by reporting it to Equipment Management as an "Off-Campus Loan" on an EIMR.*

   NOTE: Only Equipment Management can enter a "Y" into the "Off-Campus Use" field which immediately precedes "Alt. Location."

5. Inventory Use %: Do not change the default setting of 100%, unless an asset is shared between departments, in which case the owner department enters its percentage use. (A definition of Inventory Use Percentage is available by positioning the cursor on the field and pressing PF1. See the "Help Screens" section for further information.)

6. Inv(entory) Status: The original (purchase) status of the asset (unless it needs repair). This is a mandatory field and must be one of the four following codes. (This list is available online by positioning the cursor on the field and pressing PF1. See the "Help Screens" Section for further information.)

    N: Bought new
    E: Bought used, reconditioned
    O: Bought new, without reconditioning
    R: Repairs needed

    Helpful Hint: *Inventory Status "E" and "O" should be used VERY RARELY, only in cases where the asset was already used at the time of purchase (for example, a 1995 pick-up truck purchased in 1999); they should NEVER be used to describe the current "used" condition of an asset which was purchased new in 1995.*

7. Inv(entory) Con(dition): The current condition of the asset. This is a mandatory field and must be one of the four following numeric codes. (This list is available online by positioning the cursor on the field and pressing PF1. See the "Help Screens" Section for further information.)

    1: Excellent
    2: Good
    3: Fair
    4: Poor

8. Building (Number): This is a mandatory field and must be a building number recorded in the official campus database maintained by Budget & Planning. (A listing (by building name) is available by positioning the cursor on the field and pressing PF1. See the "Help Screens" Section for further information.)

9. Room (Number): This is not a mandatory field, because not all assets are located in rooms, and may be left blank; if a room number is entered, it must be recorded in the official campus database, or it will be rejected. (A listing (by building, then room number) is available by positioning the cursor on the field and pressing PF1. See the "Help Screens" section for further information.)

    Helpful Hints Regarding Building and Room Numbers:

    a. A UCSB building number must be entered for each asset.

    If an asset is not located in a specific building, but in a yard or hallway, or in some off-campus or non-UCSB building location, five "Non-Building Numbers" have been created in order to permit departments to provide more accurate

information for assets not located in a building, or in a building that does not have a UCSB building number:

1100 on campus, but in a non-building location (motor vehicles, on roof tops or lawns, etc.)
1101 outside of UCSB, within the state of California
1102 outside of California, within the USA
1103 outside of the USA, within the World
1104 at sea

Even if one of these "Non-Building Numbers" is entered, all cases of off-campus use for a period of six months or more must be reported to Equipment Management as an "Off-Campus Loan" on an EIMR. EM will then check the "Off-Campus Use" field, which cannot be modified by departments and process an official transaction in the CATS database.

b. UCSB Room Numbers are almost always four-digit (plus, in some cases, one or two letters: SAASB room 4101AA, for example). Three-digit room numbers, found in trailers and temporary buildings, must usually be entered with a leading zero in order to be accepted; for example, "0105" instead of "105."

c. If room 3535A is rejected, try entering 3535; and, vice versa. Sometimes the official campus database does, or does not, include the alpha character.

d. If your department has assets in more than one building, be certain that you have the correct building/room number combination: room 3535 may not exist in building 503, but may be a valid room number for building 556.

e. Not all posted room numbers are correct; obsolete room numbers may still be in place on doorways, etc..

f. For the purpose of locating assets, only room numbers in the official campus database corresponding to assignable (classroom, office, laboratory, etc.) space are valid: the room numbers assigned to many storage rooms, mechanical closets, hallways, etc. will be rejected and will need to be entered in the Alt. Location field.

x. User (Code): The primary user of the asset. While this is not a mandatory field, it is highly recommended that it be completed, especially in larger departments and ones in which equipment is moved frequently. It may be easier to locate equipment by searching for it by user (i.e., P.I.) than by building and room number.

***Helpful Hint**: This field is limited to TWO alphanumeric characters (JB, 10, A1, etc.). Most frequently, the User Code is the user's first and last initials. Some departments prefer the order of "last name/first name". If this is the case, please be consistent: if both "Mary Smith" and "Susan Mason" work in a large department, User Codes may become confused.*